



## Checklist: Clinical Fellow Appointment

Candidate: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Date: \_\_\_\_\_

### References:

- [Faculty Relations: Clinical Fellows](#)
- [Faculty Relations: Immigration Process for Foreign Clinical Fellows](#)
- [MedNet: Clinical Fellows](#)
- [Postgraduate Medical Education](#)

### **Please have the following before initiating HR Business Processes in Workday:**

#### **1. Have a position available within the appropriate Supervisory Organization**

- Availability Date and Earliest Hire Date
- Job Details (Job Profile, Time Type, Location, Worker Type)
- Salary details (if applicable)

#### **2. Collect clinical fellow's personal information**

- Contact Information (email is required)
- Date of Birth
- Social Insurance Number

#### **3. Employment Agreement (Offer Letter)**

- For **unpaid** appointment, please refer to the Clinical Fellow Unpaid Offer Letter template on [MedNet](#).
- For paid appointment, please refer to the Faculty Relations template for [Other Faculty Term Positions](#).
- Must include appointment terms: start/end dates, salary, job duties, reporting structure, etc.
- Must also include the CAPER language.

##### **Canadian Post-MD Education registry (CAPER)**

By signing this letter, you authorize the Faculty of Medicine to provide CAPER the statistical information (ie. personal information, field of training, etc.) they need for their reports. The data will be used to compile statistics pertaining to post-MD training and Physician Resources Canada.

<https://caper.ca/en/>.

- Signed by: Dept Head/School Director and Clinical Fellow.

#### **4. Application for Approval of Appointment of [Postgraduate \(Fellow\) Form](#) for Clinical Fellows, or Application for Approval of Appointment of [International Postgraduate Trainee \(Elective\) Form](#) for Postgraduate Trainees**

- The start/end dates on the application form must relate to the appointment period.
- Signed by: Clinical Fellow/Postgraduate Trainee, Department Head, VP Medicine, and Associate/Assistant Dean of Postgraduate Education.
- Training Plan is now required as part of the application by the PGME Office. Please refer to Page 1 of the Application Form for more details.

**Questions? Please contact Faculty HR Team 604-827-1763**



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**5. Curriculum Vitae**

- CV must show that applicant has received his/her MD (or equivalent).

**6. License or Annual Certificate**

- Clinical Fellows and Postgraduate Trainees must obtain a valid license (Educational - Postgrad Fellow/Trainee License) or a valid Annual Certificate (normally expires on February 28<sup>th</sup>) from the College of Physicians and Surgeons of BC in order to perform clinical work.
- Regardless of whether a candidate holds a license or an Annual Certificate, the start/end dates of the appointment must align with the license/annual certificate valid dates.
- NOTE: During COVID-19 pandemic restrictions, Clinical Fellows/Postgraduate Trainees may start their appointment outside the licensure dates by providing non-clinical research work with the understanding that they will apply for and obtain the proper license once self-isolation is completed.

**7. Work Permit (if applicable)**

- Attach a copy of the work permit which lists UBC as the employer or open.

**8. Define Costing Allocations (if applicable)**

- Identify the worktag name/number (i.e. Cost Center, Program, Grant, Project) of where the payroll costs will be allocated/charged.
- Cost Allocation shows by percent only; Recommended that the initiator add supporting documentation or comments advising the financial approver (Budget Manager) of the dollar amount that is being allocated/charged to their Worktag.
- Worktags:
  - General Salary Plan (REG).** Eligible for benefits if eligibility requirements are met. Do not use Clinical Earnings (CLI) for Clinical Fellow appointments. General Salary Plan assumes clinical work for Clinical Fellows.
  - Faculty Fellowship (PFL).** Not eligible for benefits. Income tax will be withheld (taxes deducted but no CPP or EI). Provide a document that clearly designates the individual receives an award in their name. Attach Research Project Budget sheet (RPB) if research work or a granting agency award letter if an RPB is not issued.
  - External Funding (NUF).** Not eligible for benefits. If being paid exclusively from sources external to university, unit may treat as unpaid appointment or include NUF line at the unit's discretion. For tracking purposes only. The speedchart for the NUF line would be one of the supervising faculty member's PG's (confirm with finance manager).

**9. Multiple Earnings Hire (if applicable)**

- If being paid a combination of General Salary (REG), and/or Fellowship (PFL), please be sure to add Allowance Plan (at Default Compensation Step).

**NOTE:**

- **Maximum appointment period of 1 year at a time in Workday, normally for a maximum of 2 years in total.**
- **The Department/Division is responsible for confirming that the Postgraduate (Clinical) Fellow has appropriate personal medical malpractice insurance.**